

# Chapter Officer Guidelines

## Duties of Officers

### Chapter Officer Transition and Continuity

Continuity is one of the most essential attributes of a successful Psi Chi chapter. Although particular chapters might excel occasionally based on the strengths of individual officers, the consistently successful chapters are those that plan and carry out programs that ensure continuity from year to year.

Because the student leadership of Psi Chi chapters changes from year to year, it is imperative that chapter officers seek to train newly elected officers and prepare them for the transition of chapter leadership. The Psi Chi Central Office receives innumerable requests for help from chapter officers who have assumed their duties with little or no help from those who preceded them. These new officers often have not received any chapter materials from their predecessors, they have not been informed or trained concerning their duties, and they are unfamiliar with local and Society procedures.

The most commonly heard comment concerning unsuccessful transitions is that the end of the spring semester is a particularly busy time in the school year, especially for graduating seniors (*and most chapter officers are seniors*). And yet a large number of chapters elect and install new officers in the latter half of the spring semester. Even worse, some chapters wait until the fall to elect new officers, when it is almost impossible to effect a successful transition of leadership. Another problem related to the late election of new officers is that sometimes the registrations of new members are not sent to the Central Office because of the confusing transition late in the year.

This common problem is being solved by an increasing number of chapters who have moved their officer elections to either the end of the fall semester or the beginning of the spring semester. The officers-elect then have the opportunity to work along with the incumbent officers for an entire semester, learning the duties of their offices and the proper procedures involved on the local and Society levels. There is more time to pass on chapter materials and other crucial information, and there is less of a chance that the proper handling of new registrations will be overlooked. Another benefit is that the new officers have more time for planning and preparing for a strong start-up in the fall.

In addition, the Psi Chi Central Office strongly encourages each officer and each standing committee to establish a notebook to be used and passed on from year to year. All of the records, forms, materials, and information necessary and helpful for the performance of the duties of the office or committee can thus be kept together in an organized fashion and more easily be transferred to successors. Not only does this practice help to ensure the continuity and success of the chapter, it also saves new officers and committee members a tremendous amount of valuable time that would otherwise be spent in gathering information and “reinventing the wheel,” and it makes it possible for the chapter to benefit from cumulative wisdom and experience concerning how to operate the chapter efficiently and effectively.

### Chapter Leadership and Organization

The following outline is offered as a set of guidelines to assist chapters in organizing and defining leadership roles and responsibilities. These guidelines have been gleaned and compiled from the accumulated wisdom and past experiences of numerous successful Psi Chi chapters. The Psi Chi Central Office does not require that every chapter conform to these guidelines; rather, we encourage each chapter to use them as a valuable resource and adapt them to the chapter’s particular needs and circumstances.

## President

### General Duties

- Chapter leadership
  1. Provide role model of enthusiasm, integrity, fairness.
  2. Lead membership—define and pursue goals and objectives of chapter.
  3. Delegate responsibilities: ensure all members are assigned a task or placed on a committee so each member can participate in the activities and work of the chapter.
- Chapter meetings
  1. Call meetings to order and preside at meetings.
  2. Announce business before the chapter.
  3. Preserve order and decorum.
  4. Be familiar with parliamentary procedure.

### Specific Duties

#### Following election and before end of spring term

- Receive thorough orientation from preceding president and from faculty advisor(s). Ensure that predecessor turns over to you all necessary chapter materials, including president’s notebook. President’s notebook should contain all forms and materials for operating the chapter at the local and Society levels, including Central Office forms and mailings, copies of minutes of past meetings, membership roll, list of committees, chapter budgets, reports of chapter activities, and any other notes or materials found to be helpful in carrying on the duties of chapter president.
- Confirm with faculty advisor(s) and outgoing officers that accounts from academic year are cleared and that all reports have been submitted to Central Office.
- Registration materials (form, cards, fees) sent to Central Office.
- All supplies ordered from Central Office paid for.
- Chapter activities report—one per year submitted to Central Office.
- New officers report to Central Office.
- All other chapter bills paid.
- Study and follow *Psi Chi Chapter Handbook*.
- Become familiar with resources, both local and Society level.
- Plan meeting to prepare for upcoming academic year.

#### Begins with fall term and continues through year:

- Be sure that Psi Chi has met requirements for campus recognition with dean of students (or similar office) and student government.
- Survey campus needs and individual members’ talents in planning service and leadership projects.
- Plan a retreat or kick-off meeting in late summer or early fall so members can get acquainted with each other, and goals and objectives for year can be established.
- Involve all members on committees and in activities and delegate and assign responsibilities. Always follow up.
- Keep a list of objectives with dates and deadlines.
- Establish regular meeting times
  - for entire chapter
  - for officers and advisor(s)
- Determine if extra funds are necessary and plan fundraising functions.
- Make appointment early in the year with president of your college or university and with dean of students
  - Offer services of your chapter to assist with projects.
  - Invite president and/or dean of your institution to speak at a meeting or other event.
  - Describe Psi Chi, its goals, and its accomplishments at your chapter and at the Society level (check *Eye on Psi Chi* for Society and chapter activities).
- Be prepared to represent Psi Chi whenever the occasion arises.
- Ensure that the chapter participates in Society Psi Chi elections.

#### Before end of spring term

- Ensure all required forms have been sent to the Central Office, including the year-end chapter report.
- Ensure all new officers have received officer materials from their predecessors and they are comfortable with their working knowledge of their duties and responsibilities.

# Chapter Officer Guidelines

## Vice-President

- Receive thorough orientation from preceding vice-president. Ensure that predecessor turns over to you all necessary chapter materials, including vice-president's notebook. Vice-president's notebook should contain membership roll, records of past programs and activities, information about obtaining facilities, a list of chapter committees, and all other past records and materials necessary or helpful to the vice-president for carrying out the vice-president's duties.
- In absence of president, or at request of president, perform president's duties.
- Serve as program chair for chapter.
  - Introduce speakers at meetings and programs.
  - Obtain facilities for meetings and programs.
  - Ensure that all meetings and programs are properly publicized.
- Assist chairs of committees.
- Assist secretary in preparing report of chapter activities to send to Central Office.
- Keep in close contact with president and faculty advisor(s).
- Organize nomination and election of chapter officers, preferably at the end of fall term or beginning of spring term to allow new officers to work with incumbent officers and become familiar with duties of office.
- Orient successor and turn all materials over to that person, including vice-president's notebook.

## Secretary

- Receive thorough orientation from preceding secretary. Ensure that predecessor turns over to you all necessary chapter materials, including secretary's notebook. Secretary's notebook should contain membership roll, copies of registration materials and forms, copies of minutes of past meetings, attendance records, list of chapter committees, copies of past correspondence, records and reports of chapter programs and activities, all forms and materials for operating the chapter at the local and Society levels, and any other notes or materials found to be helpful in carrying on the duties of chapter secretary.
- Take and record minutes of each meeting.
  - Distribute copies of minutes or make copies available to all members.
  - Keep accurate roll of members' attendance at meetings.
- Prepare an order of business for the president.
- Keep a list of all committees of the chapter.
- Have custody of all papers of the chapter not in the custody of the other officers or the faculty advisor(s).
- Sign the chapter's order to the treasurer for the disbursement of any of the chapter's funds.
- Carry on necessary correspondence.
- Compile list of email addresses of all chapter members.
- Distribute all emailed *Psi Chi Digest* messages from the Central Office
- Notify all members and advisors of place and time of meetings, elections, inductions, and other chapter activities.
- See that registration cards are properly filled out, prepare registration forms, and ensure that registration materials are sent to the Central Office at least three weeks prior to all inductions.
- Prepare report of chapter activities and election of new chapter officers and send to the Central Office for publication in *Eye on Psi Chi*.
- Receive and distribute all materials from the Central Office, including copies of *Eye on Psi Chi*.
- Orient successor and turn all materials over to that person, including secretary's notebook.

## Treasurer

- Ensure that former treasurer turns over to you all officer materials, including the treasurer's notebook and permanent-bound accounting book. If a treasurer's notebook and permanent-bound accounting book are not being used, establish and start using them.
  - Treasurer's notebook should contain all forms and materials for operating chapter at the local and Society levels, past and current chapter budgets, and any other notes or materials found to be helpful in carrying on the duties of chapter treasurer.
  - Permanent-bound accounting book should contain records of all financial transactions (income and expenditures) of the chapter, including membership fees, dues, orders for supplies and special certificates, payment of bills, etc.
- Verify information concerning Psi Chi funds, deposits, and accounts, and change signature on all bank accounts from predecessor to yourself.
- Confirm with predecessor that the year-end financial report has been filed with the Central Office for previous year.
- Establish working budget with your chapter.
- Collect all fees and dues. All Society registration fees should be collected and deposited in time for one check or money order to be obtained and sent to the Central Office no later than three weeks before the induction of new members is to take place.
- Pay all bills promptly. Ensure that all disbursements of chapter funds are made on order of the chapter.
- Report to chapter on a regular basis, including an end-of-the-year report. The financial records should be kept up to date and readily available for observation by advisors, officers, and members of the chapter. Because of the importance of keeping these records accurate and safe, always keep them in a secure location in the department or chapter office. They should not be taken home or carried about casually.
- Complete the year-end financial report for current year and file with the Central Office.
- Orient successor and turn all materials over to that person, including treasurer's notebook and permanent-bound accounting book. Ensure that all records are in order before turning them over to successor. With new treasurer, change signature on all bank accounts.

## Possible Supplementary Offices and/or Committees

The most active and successful chapters are those in which all members take part in the activities and work of the chapter. Though each chapter is different, the following categories illustrate the types of offices and/or

committees that many chapters have found useful to accomplish more efficiently their unique objectives and goals. As with all other offices and committees, one of the most important duties is to preserve the continuity of the

chapter by ensuring that all information and materials are obtained from predecessors and then passed on to successors. Keeping and passing on a notebook for each office and/or committee is highly recommended.

### Historian

1. Compile chapter history as it is made.
2. See that photographs are taken at Psi Chi events.
3. Collect clippings and important correspondence.
4. Prepare scrapbook detailing events of the year.
5. Promote awareness of anniversaries and past events and successes.
6. Ensure that the chapter's historical records are properly preserved.

### Publicity/Public Relations

1. Promote awareness of Psi Chi (both the Society organization and the local chapter) to the campus community and the community at large.
2. Publicize all Psi Chi events, programs, and activities.
3. Distribute monthly calendars to members (or similar schedule of activities).
4. Establish and maintain good relations with campus media.
5. Submit newsworthy items about chapter or individual members to campus and community media (and also to the Central Office for *Eye on Psi Chi*).
6. Solicit news items from members.

### Membership

1. Organize membership drives.
2. Ensure that all student information is gathered and processed properly to determine eligibility for membership.
3. Ensure that all registration materials are completed and sent with fees to the Central Office at least three weeks prior to induction.
4. Plan induction ceremonies, preferably at least two each year.

### Program

This category often is broken down even further into the following types of programs and activities:

1. Speakers/Symposia/Colloquia/Workshops/ Field Trips
2. Service Projects/Philanthropies/Tutoring/Advising
3. Fundraising
4. Social

### Editor/Newsletter/Journal

1. Be responsible for chapter publications.
2. Encourage the publication of student research.

### Campus Liaison

1. Serve as liaison between Psi Chi and other campus organizations.
2. Represent Psi Chi in student government association or similar group.
3. Promote interaction and cosponsorship with other campus organizations.

### Student/Faculty Liaison

1. Serve as liaison between members/psychology students and faculty members.
2. Assist faculty members with student advising.
3. Aid faculty members in finding students to assist with research.
4. Aid students in finding faculty members who are doing research in their areas of interest.

### Alumni

1. Serve as liaison with area and chapter alumni.
2. Establish and maintain a mailing list of chapter alumni.
3. Use mailing list to keep alumni informed of chapter activities.
4. Incorporate alumni into current chapter programs as speakers, workshop leaders, etc.
5. Send copies of alumni records to Central Office.

### Elections

1. Organize nomination and election of chapter officers, preferably at the end of fall term or beginning of spring term to allow ample time for new officers to work with incumbent officers and become familiar with duties of office.
2. Make sure that chapter election procedures are included in chapter bylaws to ensure fairness and continuity from year to year.
3. Nominate candidates for Society office on behalf of the chapter (must be submitted by December 15).
4. Ensure that the chapter is aware of Society elections, becomes familiar with candidates, takes a vote of the membership, and sends the official chapter ballot recording the results of that vote to the Central Office prior to the ballot deadline (must be submitted by March 15).

### Awards

1. Organize and plan for awards to be presented to outstanding student members and faculty.
2. Develop and oversee scholarship fund.
3. Ensure that members are aware of Society Psi Chi research awards and grants, and encourage them to apply.
4. Nominate faculty advisor for regional or Society advisor award, nominate chapter for regional or Society chapter awards, and nominate chapter president for Wilson Leadership Award.
5. Encourage chapter to fulfill all requirements for a Model Chapter Award.

### Website

1. Gather information for, organize, and maintain chapter website (or webpage). For ideas, see other Psi Chi chapter websites at [www.psichi.org/chapters/websites.aspx](http://www.psichi.org/chapters/websites.aspx)